



Borel Private Bank & Trust Company®

Job Description

Borel Private Bank & Trust Company, headquartered in San Mateo, California, is a wealth management firm offering private banking, investment management, and financial planning services to our clients.

Not only is Borel Private Bank & Trust Company the best place to bank, it is also the best place to work, having been voted one of the Best Places to Work in the Bay Area 2004 - 2010 by the Business Times and Business Journal! An attractive work environment, combined with excellent salary and benefits, makes Borel Private Bank & Trust Company an ideal choice for your banking career. Borel Private Bank & Trust offers a competitive salary, bonus program, 401(k) and excellent career growth opportunities.

Position: Vice President – Palo Alto Mortgage Lender

PURPOSE OF THE JOB: Actively solicits, develops and manages mortgage banking relationships with high net worth clients. Independently expands client base with emphasis on quality portfolio growth and profitability. Strong emphasis on cross-selling Borel Private Bank & Trust Company products and services.

MAJOR AREAS OF RESPONSIBILITY:

- Develop and implement a marketing plan for expanding new client base and product usage. Identifies prospects and referral sources for solicitation through outside referral sources.
- Develop and maintain social and civic ties within the community to assist in promoting account relationships with targeted client base.
- Meet or exceed mortgage production goal on an annual basis.
- To effectively and pro-actively sell all of the organization's services with a special focus on developing strategic relationships defined as those clients who have three or more of the Bank's services.
- To structure all credits, develop a complete application and monitor loans from origination through closing to ensure the highest service and credit quality.
- To focus on California market with a focus on selling both profitable portfolio and secondary market products.
- Respond to client and referral requests in a timely, professional manner.
- It is the individual responsibility of every employee to maintain a current awareness and understanding of appropriate banking laws, regulations, internal policies and procedures and to comply fully with those laws, regulations, policies and procedures.
- Develop and maintain relationships with centers of influence including real estate agents, CPAs, attorneys and other loan professionals.
- Educate the branch team on current products and foster an environment of sharing leads and referrals.

MINIMUM QUALIFICATIONS AND EDUCATION REQUIREMENTS:

- College Education
- 5 yrs of mortgage lending experience
- Experience lending in the Palo Alto are
- Working knowledge of banking industry and products

For this position, submit your résumé via e-mail ONLY to Humanresources@borel.com . No telephone calls please.

For more information about Borel Private Bank, please visit our website at www.borel.com. Borel Private Bank & Trust Company is an Equal Opportunity Employer.